Hotdocs and Document Assembly
Future of Technology Session – NLADA 2002

1. Explain the project or innovation.

A variety of web-based document automation initiatives are moving forward as part of this year's TIG projects, following up on last year's national study of software platform alternatives. (Results of last year's study are all at LStech.org.)

Thanks to a donation from LexisNexis, two copies of HotDocs Pro are being made available to every state for the purpose of template creation and maintenance. These can be used to create document assembly applications for traditional desktop use, or for online delivery, as described next.

A HotDocs Online pilot project is being done by the Illinois Technology Center and Capstone Practice Systems in collaboration with several grantees (Minnesota, Indiana, Ohio, New Jersey, and Pennsylvania). This project involves building and testing a model environment for online document assembly that can be used in advocate, pro bono, and pro se scenarios, and accessed remotely, including through Probono.net and Kaivo portals.

In other words, people in various parts of the country will be able to take new or existing HotDocs templates, "publish" them in a form that can run through a browser, upload them to the ITC server, and then make them available for use through their statewide websites by staff, clients, and other self-helpers.

2. What was the reason for the innovation? What problem was it designed to address?

The Online project is designed to build a shared resource for handling the technical and administrative arrangements necessary to provide the above results. Our goal is to define the many issues and design choices involved, figure them out, get things working, and document and publicize our findings. Along the way we plan to gain a lot of knowledge and build human capacity through training and online collaboration.

By sharing resources, using donated copies of industry standard software, and focussing our efforts on "out of the box" functionality to the extent possible, we hope to be able to delivery significant benefits in a short time and at modest expense.

3. What has been the benefit for the field and program? What has it delivered for you?

No results yet - just beginning.

4. What barriers did you encounter in implementing or creating the program?

Ditto.

5. What kind of commitment did this project take financially, for your staff, etc?

This project has multiple commitments. First, there is a commitment by several different states to the Illinois Technology Institute to develop an interface for uploading and maintaining the templates. The cost for this is $50,000. Second, Marc Lauritsen is being hired to coordinate the development of design standards for templates and to do training for the first deploying HotDocs. This will cost $30,000.

When this project is finished, it will be available for every statewide web site, but the templates for clients and staff will not create themselves. Programs will need to commit staff time and money for training to realize the full potential of this valuable new tool.

6. What do you see this project going in the future?

The first year is seen as a pilot, and we hope to lay the groundwork for a production environment at one or more locations next year that can provide ongoing web-based document automation services to the legal services community.

7. What technology did you use?

HotDocs Pro, HotDocs Online Server, ColdFusion, SQL Server